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AGRICULTURE POLICY REVIEW

Analysis of how Ireland's grass-fed
agricultural system shapes land use
and value

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Agriculture: Policy Review

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INTRODUCTION

This policy review examines land use in Ireland, with particular emphasis on agriculture, and draws on concepts that support a sustainable transition and fairer futures.¹ It therefore requires a review of policy as constructed, but also an interrogation of the wider political economy to observe, however fragmentary, the current dynamics that may help or hinder a move towards a just transition. It takes as its starting premise that Irish land use policy cannot be understood separately from long-durational, structural dynamics that shape the agricultural system. Policy design matters, but structural conditions also significantly influence implementation and outcomes.

Government interventions in the Agriculture, Forestry, and Other Land Use (AFOLU) sector should be grounded in a cogent understanding of current patterns of land use and land use change in Ireland. The JUTLAND project aims to

move from description to interrogation by systematically examining and identifying key policy interventions, implications, current barriers, and actionable solutions to support Ireland's transition to sustainable and equitable land-use planning and management. This requires an interdisciplinary, mixed-methods methodology that integrates political science, political ecology, and human geography to analyse land-use change and support just transitions in the AFOLU sector, starting with an outline of land use itself.

The Republic of Ireland has around 7.1 million hectares of land cover.² Grassland accounts for 61% of the total.³ Forest and woodland cover is at 11.4%, cropland is 6.3%, while settlements and other artificial areas comprise 4%. Grassland cover is the highest in the EU. It is three times the EU average (17%), and almost twice that of the Netherlands (33%), its closest comparator.⁴ Over 90% of grassland (3.9

¹ Louise M. Fitzgerald and Anna R. Davies. "Creating fairer futures for sustainability transitions." *Geography Compass* 16, no. 10 (2022)

² Figures vary between 6.9 million and 7.11 million hectares. The CSO states total area to be 7.084 million hectares. See, CSO, "Table 2.1 Ecosystem extent account, by ecosystem type, Ireland, 2018-2021," *Ecosystem Extent Accounts 2021* <https://www.cso.ie/en/releasesandpublications/ep/p-eea/ecosystemextentaccounts2021/extentaccounts-national/> accessed 7 July 2026. However, the CSO also provides a figure of 7.1118 million hectares in its *Environmental Indicators Ireland 2024* report. See, CSO, "Land Use," *Environmental Indicators Ireland 2024* <https://www.cso.ie/en/releasesandpublications/ep/p-eii/environmentalindicatorsireland2024/landuse/> accessed 6 July 2026. The European Commission estimates the figure at 6.9 million hectares. See, European Commission, "Ireland – CAP Strategic Plan," *Agriculture and Regional Development* https://agriculture.ec.europa.eu/cap-my-country/cap-strategic-plans/ireland_en accessed 7 July 2026. The Environmental Protection Agency (EPA) estimates land cover to be 7.04 million hectares. See, Environmental Protection Agency, *Ireland's Environment – An Integrated Assessment 2020* (EPA, 2020), 329. The EPA in *National Land Cover Map of Ireland 2018* provides a figure of 7.063 million hectares for land cover. See EPA, *National Land Cover Map of Ireland 2018* (EPA, 2023), 33. The Land Use Review uses 7.1 million hectares: see *A Living Land: Report of Phase Two of the Land-Use Review 2* (2025), 302.

³ CSO, "Ecosystem Extent in 2021," *Ecosystem Extent Accounts 2021*.

⁴ Eurostat, "Land Cover in EU Countries: Table 1 (land cover 2022)" *Land Cover Statistics*. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Land_cover_statistics#Land_cover_in_EU_countries accessed 6 July 2026.

million hectares) comprises sown pastures and other grass, while the remainder (0.4 million hectares) consists of natural and semi-natural grassland.⁵

In terms of agriculture, the CSO estimates that Agricultural Area Used (AAU) in Ireland is around 4.48 million hectares.⁶ This equates to 63% of all land cover in the state. The estimated number of farms is 133,174, with an average size of 34.7 hectares.⁷ However, this varies considerably depending on the type of specialist farming undertaken.⁸ It ranges from an average of 17 hectares for mixed field crop farming to 70 hectares for specialist dairying. Almost two-thirds of specialist sheep farms are in the border and west regions, while more than two-thirds of specialist dairying farms are in the mid-west, south-east, and south-west regions. Around 56% of all farms across the state are classified as specialist beef. Less than nine% of all farms specialise in mixed crops.⁹ Overall, the dominant use of land in Ireland is producing grass as feed for livestock—particularly cattle and sheep. Understanding the origin and development of this system is key to

understanding its current stickiness in policy and its future direction.

HISTORICAL DYNAMICS

The dominant view in the literature on Irish agriculture is that the supremacy of livestock and the grass-fed system stems almost entirely from Ireland's temperate climate and the natural advantage it gives over other European states. It is often portrayed as the natural outcome of Ireland's wet and temperate climate; however, the system itself, including its policy-driven targets of production, has within it certain, historically grounded, structural pressures—at political, economic, societal, geographical, and ecological levels—and as such the origin, production, and ongoing reproduction of this deeply embedded agricultural system demands greater interrogation.

Two key dynamics which continue to affect policy today were in place at that time of the creation of the Irish Free State (Saorstát Éireann) in 1922: the particularities of Irish farm ownership, and the predominance of grass-fed cattle on the land. Neither one was the result of competition, free trade, or Ricardian comparative advantage:

⁵ CSO, Table ESA11: National Ecosystem Extent Accounts from 2018 to 2021 <https://data.cso.ie/table/ESEA11> accessed 7 July 2026.

⁶ CSO, Table AQA06. Area Farmed in June 2013-2025 <https://data.cso.ie/table/AQA06> accessed 7 July 2026.

⁷ CSO, Farm Structure Survey 2023. <https://www.cso.ie/en/releasesandpublications/ep/p-fss/farmstructuresurvey2023/farmstructure/> accessed 7 July 2026.

⁸ "Farm specialisation describes the dominant activity in farm income: an agricultural holding is said to be specialised when a particular activity provides at least two-thirds of the standard output of an agricultural holding." Eurostat, "Agri-environmental indicator - farm specialisation," *Statistics Explained* - https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Agri-environmental_indicator_-_farm_specialisation accessed 7 July 2026.

⁹ CSO, "Table 2.3 Number of Farms by Region, County and Farm Type 2023," *Farm Structure Survey 2023* <https://www.cso.ie/en/releasesandpublications/ep/p-fss/farmstructuresurvey2023/farmstructure/> accessed 7 July 2026.

rather, both owed their presence, on one hand, to the British colonial system of agricultural and landlord extraction on the island, and on the other, to organised resistance to the same. This created tension within Saorstát Éireann: Irish farmers owned their own land, but agricultural exports were dominated by the primary production of live cattle and sheep for England. This led to fractures within Irish farming as a social class, mainly between small farmers and large cattle graziers (or “ranchers”). The 1923 Commission on Agriculture acknowledged this, calling it “one of the most controversial of rural problems.”¹⁰ The move to ameliorate these tensions, while still maintaining the focus on primary production, would influence Irish political and economic life for the next fifty years, with the domination of primary-production-led exports in agriculture only coming to an end in the years leading up to and after Ireland’s accession to the European Economic Community (EEC) in 1973.

Phase II of the Land Use Review report captures an element of this tension. It deals with the 1880s Land War, “which was orchestrated by the Land League, to remove the inequality in Irish land ownership” and which led to the “transfer of Irish land from the Anglo-Irish landlords to their tenant farmers,” making the latter “the leaseholders of

parcels of land no longer and instead their owner-occupiers.”¹¹ The Land League itself was “above all a class alliance of the rural bourgeoisie, the middle and poor peasantry, and the agricultural proletariat ... The large and middle farmers were looking for rent reductions, the smallholders of the west were looking for land redistribution, while the labourers of the south were contemplating at least a general strike for better wages.”¹²

Although the 1880s were dominated by the Land League and the campaign for ownership, smallholders in the south and west knew that a simple transfer of title (from tenant to owner-occupier) would not, by itself, transform the inequalities inherent in the system of production outlined above. As observed by the historian Paul Bew, “there was a widespread awareness [among smallholders] that their land – even if rent-free – could not support a family and that they needed more land.”¹³ This point is somewhat acknowledged by the Land Use Review report, which writes that in the wake of the Land War settlement, “the transfer of Irish land from the Anglo-Irish landlords to their tenant farmers had not involved any commensurate transformation in Irish farm structure.”¹⁴

Similarly unaffected was the system of production on the land itself,

10 Commission on Agriculture, Reports of the Commission on Agriculture (Stationary Office, 1923), 33.

11 Micheál Ó Fathartaigh, A History of Land Use in Ireland: A Report at Part of Phase 2 of the Land Use Review (Government of Ireland, 2026), 9; 14.

12 Paul Bew, Land and the National Question in Ireland, 1858–82 (Dublin, 1978), 223.

13 Quoted in Tony Varley, “A Region of Sturdy Smallholders? Western Nationalists and Agrarian Politics during the First World War,” *Journal of the Galway Archaeological and historical Society*, vol. 55 (2003), 142, footnote 2.

14 Ó Fathartaigh, History of Land Use, 15.

which remained dominated by the primary production of live cattle for export to Britain. This “dependency on the British market as the only market for Irish agricultural products,” writes the Land Use Review report, “restrained the financial outcomes for farming families [and its] exclusive economics nullified the impact of inclusive productivism.”¹⁵ The Review takes inclusive productivism to mean developing “other international markets for Irish agricultural products.”¹⁶ Upon independence in 1922, the official policy of the first free state government, however, was to leave this dependency on live cattle exports untouched. “While fully alive to the disadvantages attendant on the use of rich pasture lands merely as pasture”, wrote the members of the 1923 Commission on Agriculture, “we are inclined to support the view that either greater profit to the occupier or greater advantage to the community at large will not follow from their use in any other way, and we therefore recommend the government to proceed with due caution in the matter of their redivision.”¹⁷

The issue was not just one of grass over tillage: the type and breed of cattle raised on Irish farms was also a factor in limiting Ireland’s potential for “inclusive productivism.” The dominant breed in Ireland at the time was the Shorthorn. The modern breed was

originally developed in Britain and introduced to Ireland around 1820 as potentially suitable for both beef and dairy production. By 1860, Ireland was a “centre of excellence for Shorthorns”, and by the 1880s it had effectively replaced the Old Irish cow. The Dairy Shorthorn was bred for both beef and dairy, earning it the moniker of Dual-Purpose Shorthorn.¹⁸

Yet the “dual-purpose” tag was a bit of a misnomer. The Dairy Shorthorn was bred primarily for its beef, not its milk. The Shorthorn’s relative inferiority as a dairy cow was seen as a small price to pay to maintain the structural and highly regional dynamics of the Irish cattle trade with Britain. In a report produced in 1920 by the Department of Agriculture and Technical Instruction for Ireland, its authors said that it did not wish “to exclude from consideration by the Department the desirability of encouraging the establishment of pure-bred herds of cattle of a milking strain, such as Friesians or Ayrshires, where a plentiful supply of milk is the main consideration.”¹⁹ However, while there was an obvious need to at least improve the milking strain of the Dairy Shorthorn via selective breeding, “having regard to the importance of the store cattle trade we do not consider any amendment of the Department’s [cattle breeding] scheme so as to include for premium

15 Ó Fathartaigh, *History of Land Use*, 65.

16 Ó Fathartaigh, *History of Land Use*, 65.

17 Commission on Agriculture, *Reports*, 35.

18 “The terms dual-purpose shorthorn refers to the type of animal now popularly called the dairy shorthorn. It does not apply to any pedigree shorthorn not having a satisfactory milk record.” Commission on Agriculture, *Reports*, 46.

19 Department of Agriculture and Technical Instruction for Ireland, *Report of the Departmental Committee on the Decline of Dairying in Ireland* (Dublin, 1920), 13.

purposes bulls of a purely milking breed, such as the Friesian, is to be recommended.”²⁰ The authors did not believe that “taken as a whole, either the dairying industry or the farming industry generally would be permanently benefited by the crossing of our deep-milking Shorthorns—whether pure-bred or half-bred—with a strain of cattle *which might produce good milkers, but inferior stores* [my emphasis].”²¹ This was an argument, not for national agricultural development as a whole, but for the primacy of British agricultural needs and the income of Irish graziers. It was also an argument against investment. The diversity in agricultural produce that was needed to wean Ireland away from low-value live cattle exports to Britain—a business that primarily benefited British beef processors and large Irish cattle graziers—would require significant levels of investment in order to replace, where needed, the dual-purpose shorthorn with a single-purpose dairy breed such as Friesian.

This approach was in contrast to at least part of the rationale behind Irish independence in 1922, which was the creation of an Irish parliament with the powers to shift already-existing agricultural and industrial policy, which was dictated by British economic interests, towards an actual *Irish* agricultural and industrial policy, dictated by indigenous Irish interests in the aggregate, with the wider state and

society in mind. The Irish state may have had free trade with Britain, but it was not equal trade. A deep, historically grounded imbalance meant the Irish state supplied British manufacturers, processors, and distributors with raw materials and a small selection of food and drink products, while those same manufacturers, processors, and distributors exported finished goods to Ireland with relatively few obstacles. People at the time did not miss this. However, the three government-appointed commissions set up to examine the economy in the wake of the civil war—the Commission on Agriculture (1923), the Fiscal Inquiry Committee (1924), and the Banking Commission (1927)—all decided in their majority reports that with regard to the respective sectors under discussion, things should remain as they were pre-independence, that Ireland should “maintain parity and financial links with sterling, produce food for Britain, and retain a free trade industrial sector.”²²

One of the main stumbling blocks to necessary state-building investment, at least in official state policy, was the Department of Finance's fiscal conservatism, which sought to keep the link with sterling as secure as possible. Ireland exported not only cattle to England; it also exported credit via the *de facto* single-currency sterling area, of which Ireland was a member. The Irish Free State may have printed its own notes and minted its own coins, but

20 Department of Agriculture and Technical Instruction for Ireland, Report, 28.

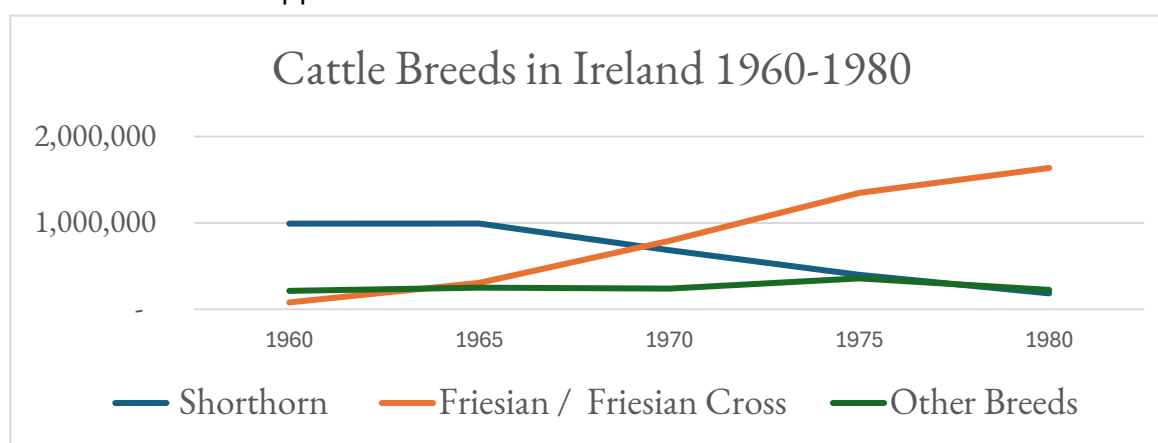
21 Department of Agriculture and Technical Instruction for Ireland, Report, 13.

22 Daly, 16.

overall monetary policy remained, in effect, with the Bank of England. To maintain that link, the Irish state had to avoid levels of expenditure and investment that Bank of England officials would have seen as inflationary. Irish government ministers and analysts at the time, as referenced above, were keen to label this trade with Britain as free trade, but the term does not do justice to the actually existing dynamic, which was a continuation, post-independence, of the deeply unequal, colonial-extractive, trade relationship that had fueled, in part, the independence movement in the first place.²³

In agriculture, these policies meant continuing the pre-independence system of production and the structurally weak reliance on the Dairy Shorthorn to provide both beef cattle and milk through open grazing. The state's continued support for the so-

called “dual-purpose” Shorthorn, coupled with deficient winter feeding, effectively condemned the dairy industry to regression. The catalysts for change came in the 1960s: first, through reduced demand for live cattle exports to Britain; second, through the opening of membership procedures for the European Economic Community. In 1964, the Shorthorn breed accounted for almost 90% of the Irish cattle population—the same percentage as in 1919.²⁴ By 1980, its numbers had declined by over 80%, falling from 992,585 to 183,530 over the previous twenty years; meanwhile, the population of Friesian and Friesian-cross breeds increased by almost 2,000% during the same period, going from 78,670 to over 1.6m.²⁵ The introduction of the single European market in 1992 accelerated this trend, and today over 93% of Irish dairy cows are Holstein-Friesian.²⁶



²³ It is worth noting that the administrative common sense fostered by such an ideological view, where capital investment was dismissed as an unnecessary state indulgence, would return in the form of government fiscal short-termism in the 1980s.

²⁴ Robert McKenna, “On the Land,” *New Ross Standard*, 1 May 1964, p. 5, col. 5; Department of Agriculture and Technical Instruction for Ireland, Report, 12.

²⁵ CSO, Number of Livestock (CoA 1926-1980), table ACEN1 <https://data.cso.ie/table/ACEN1> accessed 26 June 2026.

²⁶ Teagasc, “Performance Targets for Resilient Beef Production,” Teagasc, 2022, accessed August 7, 2026, <https://www.teagasc.ie/animals/beef/grange/beef2022-open-day/beef-2022-main-stands/performance-targets-header/>.

The supplanting of the Shorthorn with dedicated dairy breeds in the 1960s and 1970s led to significant advances within Irish dairy production. In other words, it was only with the decline of the live cattle export system that dairy (and beef processing) were allowed to develop and reach a greater potential. None of the blockages stemmed from the land's advantages or disadvantages, but from production methods wedded to pre-independence practices and procedures, which in turn led to low-cost, low-investment stagnation. With Ireland's membership of the EEC, a structural shift occurred in Irish agriculture, although it should be noted that this was primarily in terms of product rather than production practices. This shift from live cattle to dairy and beef processing as the primary outputs nonetheless continued the historically grounded grass-fed system, and with-it seasonality—an issue that continues to affect Irish dairy production.

IRISH DAIRY SECTOR

There are over 200 approved milk and dairy product business operators in Ireland,²⁷ although a small number of large processors and cooperatives carry out most processing and production.

Irish dairy exports came to €7.3 billion in 2025, with over 1.6 million tonnes of product shipped to 142 markets worldwide. Butter (27%), cheese (23%), fat-filled milk powder (FFMP) (13%), and specialised nutritional powders (9%) dominate these exports.²⁸ Key markets are the EU, the UK, and North America, accounting for 42%, 17% and 13% of exports by value, respectively.²⁹ The biggest change to the sector in recent years occurred on 1 April 2015, when the EU milk quota system was officially abolished after 31 years. The Irish Minister for Finance, Simon Coveney, said it was like “removing a straitjacket” and that Ireland would now become a world dairy producer.³⁰ “Increased output will be exported” he said, “and demand will be driven by global demographics – increasing population, increasing affluence and the urbanisation and westernisation of diet in developing economies. I am working closely with state agencies and industry to further increase market opportunities.”

The lifting of the quota was first agreed upon in 2007 as part of the CAP Health Check review and, as such, had been widely planned for and anticipated.³¹ A “soft landing” mechanism had been put in place, with

²⁷ Department of Agriculture, Food, and the Marine, Milk and Dairy establishments approved and/or registered under the Hygiene Regulations <https://www.gov.ie/en/department-of-agriculture-food-and-the-marine/publications/dafm-approved-establishments/> accessed 31 Aug 2026.

²⁸ Bord Bia, *Export Performance and Prospects Report 2025–2026* (Bord Bia, 2026), 22. Other products include skimmed milk powder (7%), casein (6%), and whey (5%).

²⁹ Bord Bia, *Export Performance*, 23.

³⁰ Margaret Donnelly, “Milk quota abolition - the most fundamental change to Irish agriculture in a generation,” *Agriland*, 1 April 2015 <https://www.agriland.ie/farming-news/milk-quota-abolition-the-most-fundamental-change-to-irish-agriculture-in-a-generation/>

³¹ EU Commission. Preparing for the “Health Check” of the CAP reform. COM(2007) 722 (Brussels, 20 Nov 2007), para 3.4.

“five successive annual increases of 1% in the EU milk quota beginning in 2009/10 and continuing through to 2013/14” before its final abolition in 2015.³² This gave both the state and processors time to coordinate strategies and targets.

In Ireland, the guiding force behind agricultural policy during this period was the October 2010 publication, *Food Harvest 2020*, which led the Minister for Agriculture to establish the Dairy Expansion Activation Group (DEAG), chaired by Dr Seán Brady.³³ The DEAG was tasked with recommending actions the dairy industry needed to implement the report's key target: a 50% increase in milk production by 2020 (with 2007 to 2009 as the baseline). “This 2.75 billion litre increase would enhance the primary output value of the sector by about €700 million,” the report said, “with further downstream benefits in the form of increased dairy product values, export and employment.”³⁴

The DEAG's work and the findings of *Food Harvest 2020* were adopted across the board, from government departments and state agencies to

industry groups and dairy processors, making the 50% increase target official state policy. The DEAG set out 55 actions required to achieve this objective, broken into four categories: on-farm production, milk processing sector efficiencies, development of market opportunities, and general agricultural policy.³⁵ By November 2011, more than 90% of its initiatives had commenced.³⁶ The effect was significant, with intake of cows' milk by milk processors and co-ops going from 5.6 billion litres in 2014 to 8.8 billion litres in 2025 – an increase of 56% in eleven years.³⁷ Indeed, the sector easily surpassed the *Food Harvest 2020* target of an additional 2.75 billion litres by 2020, producing an additional 3.6 billion litres above the 2007 baseline that year.

However, the Irish grass-fed system appears to have hit a wall in 2013 in terms of yield per cow. “The average yield per cow was approximately 3,500 litres in 1984 and this increased at an average rate of 1.2% per year to 5,200 litres per cow in 2013, or a 40% increase in total over the period.”³⁸ In 2019, four years after the cap was lifted, yield per cow stood at 5,300 litres.³⁹ The Irish Food

³² Trevor Donnellan and Thia Hennessy, “The Pre-Quota Period” in *The End of the Quota Era: A History of the Irish Dairy Sector and Its Future Prospects*, edited by Trevor Donnellan, Thia Hennessy and Fiona Thorne (Teagasc, 2015), 12.

³³ Dr. Brady was also chair of the Food Harvest 2020 Committee.

³⁴ Food Harvest 2020 Committee. *Food Harvest 2020: A Vision for Irish Agri-food and Fisheries* (Department of Agriculture, 2010), 41. <https://assets.gov.ie/static/documents/food-harvest-2020.pdf>

³⁵ “2020 Road Map for Dairy Expansion Published,” *The Cattle Site.com*, 9 February 2011

<https://www.thecattlesite.com/news/33525/2020-road-map-for-dairy-expansion-published>

³⁶ Dáil Debates, Questions to the Minister for Agriculture, 2 November 2011, Question 382.

<https://www.oireachtas.ie/en/debates/question/2011-11-02/382/>

³⁷ CSO. Intake of Cows Milk by Milk Processors and Co-Ops. AKA01. <https://data.cso.ie/table/AKA01>

³⁸ Thia Hennessy, Trevor Donnellan, Patrick Gillespie, Brian Moran and Cathal O'Donoghue, “Market and Farm Level Developments in the Milk Quota Era” in *The End of the Quota Era: A History of the Irish Dairy Sector and Its Future Prospects*, edited by Trevor Donnellan, Thia Hennessy and Fiona Thorne (Teagasc, 2015), 32.

³⁹ IFA. *Dairy Factsheet*. <https://www.ifa.ie/dairy-factsheet/>

and Drink website states that the average milk yield per cow for 2022-2024 was 5,309 litres.⁴⁰ This means that from 2013 to 2024 the annual compound growth in milk yield per cow was 0.174%. The increase in total annual milk yield from 2014 to 2025, therefore, was delivered almost entirely by an increase in dairy cows. This is shown by calculating dairy cow numbers from total annual yield and comparing them with CSO figures for increases in dairy cow numbers.

The CSO records the dairy cow population in June of each year. It was 1,070,800 in 2010⁴¹ with a peak figure of 1,646,600 in 2023⁴² – an increase of 575,800 or 53% in thirteen years. Numbers have since declined slightly, falling to 1,587,900 in 2025. The increase closely matches the number of dairy cows estimated by dividing milk production (8.8 billion litres in 2024) by average milk yield per cow (5,300 in 2024), which gives a figure of 1.66 million. The number of dairy cows recorded by the CSO in 2024 was 1.62 million. The difference between the two figures – 2.4% – is small enough to conclude that the *national* increase in milk production is down to an increase in cow numbers alone.

Given the physical land constraints farmers face under the grass-fed system and Ireland's system of land ownership, the increase in dairy cow numbers had to be accommodated, for the most part, on existing farm structures with an increase in concentration of cows per hectare. The CSO conducts a farm structure survey every three years. The most recent survey (2023) noted that while the average cattle farm herd size increased from 62 animals to 72 animals (+16.1%) since 2013, the average dairy cow herd size increased from 64 animals to 98 animals (+53.1%).⁴³ It also noted that “in the 10 years from 2013 to 2023, the number of dairy cows has increased by 483,440 animals (+41.6%) while the number of other cows has decreased by 278,126 animals (-24.2%).”⁴⁴ The number of farms also fell (-4.6%), from 139,695 in 2013 to 133,174 in 2023.⁴⁵

The increase in dairy cows has led to an overall increase in the aggregate number of cows on Irish farms; however, its scale has been somewhat masked by a decrease in suckler/beef cows. This was anticipated at the time the milk quota system was scrapped. In the run-up to its removal, the Fianna Fáil TD for Galway West, Éamon Ó Cuiv, asked the minister for agriculture about the possible effect the ending of the milk

⁴⁰ Irish Food and Drink. *Grass Fed Irish Dairy*. <https://www.irishfoodanddrink.com/grass-fed-irish-dairy/>

⁴¹ CSO. Number of Cattle in June. AAA08. <https://data.cso.ie/table/AAA08>. The CSO sources these figures from the Irish Cattle Breeding Federation.

⁴² CSO. Number of Cattle in June. AAA10. <https://data.cso.ie/table/AAA10>.

⁴³ CSO. Farm Structure Survey 2023: Livestock. 17 Dec 2024
<https://www.cso.ie/en/releasesandpublications/ep/p-fss/farmstructuresurvey2023/livestock/>

⁴⁴ CSO. Farm Structure Survey 2023: Livestock. 17 Dec 2024
<https://www.cso.ie/en/releasesandpublications/ep/p-fss/farmstructuresurvey2023/livestock/>

⁴⁵ CSO. Farm Structure Survey 2023: Farm Structure. 17 Dec 2024.
<https://www.cso.ie/en/releasesandpublications/ep/p-fss/farmstructuresurvey2023/farmstructure/>

quota would have on other sectors of agriculture. “There has been a very significant drop in the number of suckler cows since 2009, at about 17%”, he said. “Has any research been carried out on the effect of the removal of milk quotas on the suckler cow herd if people move from beef into dairying?”⁴⁶ The minister replied that “Teagasc's FAPRI-Ireland modelling anticipates that, while an increase in the number of dairy cows could create some extra competition for grassland, most of the surplus dairy calves produced will go into the beef production chain. While it could be argued that the extra competition for grassland could have some negative impact on suckler cow numbers, much of the anticipated growth in milk production is likely to come from higher milk yields, which would have no consequences for competition for land.” The Minister's optimism has not been borne out by the facts. The number of suckler cows, as measured on 1 July each year, fell from 1,094,031 in 2013 to 799,630 in 2024 – a drop of 294,401 or 37% in eleven years. At the same time, the number of dairy cows increased by around 600,000. In 2025, “dairy-bred animals accounted for 62% of prime cattle slaughterings, reflecting the

ongoing structural shift in beef supply following the abolition of milk quotas.”⁴⁷

CATTLE AND THE GRASS-FED SYSTEM

The term “grass-fed” refers to a type of livestock farming whereby animals are primarily raised outdoors on pastures, grazing on grass and other forage. It is effectively the sole form of farming for dairy, beef and sheep in Ireland. While there is no legal definition of the term, in the US the Certified Grass-Fed Organic Livestock Program and Certification Mark defines “grass-fed organic product” as originating from dairy cows exclusively fed a grass diet “with at least 60% of the cow's food originating from pasture over a 150-day grazing season to qualify.”⁴⁸ The Ministry for Primary Industries in New Zealand defines dairy grass-fed as at least 90% of the animal's diet consisting of grass-fed feed types, and where cows can graze outside at least 340 days a year.⁴⁹ In Ireland, Bord Bia applies it to dairy products where “the diet of the cow is composed of at least 90% grass or grass forage on a fresh weight basis.”⁵⁰ In 2023, the EU Commission added the term “Irish Grass fed Beef” to its register of protected geographical indications. It refers to cattle on the island of Ireland that derive

⁴⁶ Dáil Debates, Milk Quota Cessation, 14 Nov 2013 <https://www.oireachtas.ie/en/debates/question/2013-11-14/8/>

⁴⁷ “More beef sired calves from the dairy herd,” *Agriland*, 18 Feb 2026 <https://teagasc.ie/news--events/daily/more-beef-sired-calves-from-the-dairy-herd/>

⁴⁸ Alice Moscovici Joubran, Karina M. Pierce, Niamh Garvey, Laurence Shalloo, and Tom F. O'Callaghan, “A 2020 perspective on pasture-based dairy systems and products,” *Journal of Dairy Science* 104, no. 7 (2021), 7375.

⁴⁹ Ministry for Primary Industries, “New Zealand grass-fed administrative standards,” <https://www.mpi.govt.nz/agriculture/new-zealand-grass-fed-administrative-standards> accessed 13 July 2026.

⁵⁰ An Bord Bia, *Grass Fed Dairy Standard* (Bord Bia, 2019), 4. <https://www.bordbia.ie/globalassets/bordbia2020/farmers--growers/grass-fed-standard/grass-fed-dairy-rev01-final.pdf> accessed 13 July 2026.

at least 90% of their feed intake from grazed grass, with winter feeding on conserved grass, and spend at least 220 days per year grazing pasture throughout their lifetime.⁵¹ This policy review will use An Bord Bia's definition, which tallies with the EU Commission's definition regarding Irish beef.

Whereas the grass-fed system is sometimes referred to as a natural outcome of Ireland's wet and temperate climate, the advantage for the dairy industry rests mainly in its low-cost inputs. "It is well-established that grazed pasture is the cheapest feed resource in Ireland and primarily for this reason it underpins Ireland's ruminant production systems."⁵² Put simply, it is less expensive to raise cattle on grass and forage than on grain-based concentrate feeds; this, in turn, lowers the price dairy processors pay farmers for milk fats and proteins, as well as the price retailers

pay for milk and associated products.⁵³ Grazed grass "accounts for 74-77% of the annual spring calving dairy cow diet, on a fresh matter basis."⁵⁴ As Humphreys, Barrett, and Fenger note, "It is clear that Ireland's competitive advantage lies in our capacity to turn low-cost grazed grass into milk. Higher-cost alternative feeds expose the farm business to downturns in milk price and upturns in concentrate costs."⁵⁵

The cost difference is significant: grass silage and concentrate feed cost three to five times as much as grazed grass.⁵⁶ Winter feed is predominantly silage-based, with around 19 million grass silage bales produced each year,⁵⁷ although pit silage is the preferred option for larger dairy farms (80-120 cows).⁵⁸ Although silage is more expensive to produce than grazed pasture, it is still 2.5 times cheaper than concentrate

⁵¹ European Commission, "Commission Implementing Decision of 28 July 2023 on the Publication in the Official Journal of the European Union of the Application for Registration of a Name Referred to in Article 49 of Regulation (EU) No 1151/2012 of the European Parliament and of the Council 'Irish Grass Fed Beef' (PGI)," 2023/C 275/13, C/2023/5322, *Official Journal of the European Union* C 275 (August 4, 2023), 26. https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.C_.2023.275.01.0026.01.ENG

⁵² Peter Doyle, Michael O'Donovan, Paul Crosson and Tomás Tubritt, "Feed costs – current situation and future scenario analysis," *Teagasc News and Events*, 3 November 2024 <https://teagasc.ie/news-events/daily/feed-costs-current-situation-and-future-scenario-analysis/> accessed 14 July 2026.

⁵³ As we will see later, the pressure from retailers for low-cost dairy products is not insignificant.

⁵⁴ H. Costigan, B. Lahart, M. Kennedy, J. Herron, J. P. M. Sanders, J. Gaffey, B. Lambrechts and L. Shalloo, "Biorefined perennial ryegrass press cake as an alternative feed for dairy cows in late lactation and during the dry period: a demonstration," *Journal of Agricultural Science* 162 (2024), 528.

⁵⁵ James Humphreys, Daniel Barrett, and Friederike Fenger, "Optimum stocking rate on the grazing platform of fragmented dairy farms." In *Irish Dairying: Growing Sustainably Wednesday 3rd July 2019* (Teagasc, 2019), 138.

⁵⁶ Joe Patton and Laurence Shalloo, "Dairy Costs and Margins Trends in Real Farm Data," *Teagasc News and Events*, 18 December 2025 <https://teagasc.ie/news-events/daily/dairy-costs-and-margins-trends-in-real-farm-data/> accessed 14 July 2026.

⁵⁷ Richard Halleron, "Silage Set to Remain Critically Important Winter Feed Source," *Agriland*, 22 April 2024 <https://www.agriland.ie/farming-news/silage-set-to-remain-critically-important-winter-feed-source/> accessed 14 July 2026.

⁵⁸ M. J. Doran, "Baled versus pit silage - the debate rages on," *Agriland* 19 June 2017

<https://www.agriland.ie/farming-news/baled-versus-pit-silage-the-debate-rages-on/>

feeds.⁵⁹ It accounts for around 18-19% of annual feed.⁶⁰ Concentrate use is seasonal; it is highest in winter and early spring, when it can contribute as much as 35% of DM intake. Overall, it accounts for 3-5% of total annual feed.

Low cost explains why grass-fed is the key driver behind state dairy policy. Indeed, there is a strong desire across “Irish government, industry, and advisory bodies to keep dairy expansion within a grass-based paradigm.”⁶¹ This dates back to before the milk quota system ended in 2015. “The unrivalled natural advantage we possess in the form of a grass-based production system”, Minister Coveney told the Dáil in 2011, “allows us to produce milk and other dairy products of the highest quality in an environmentally friendly manner and on a highly cost-efficient basis.”⁶² Given that over 85% of Irish farms make silage each year,⁶³ on top of grazed pasture, it is clear that the yearly volume of grass produced is of high importance to the Irish dairy system. However, “a considerable proportion of the dairy cow diet (>50%) must comprise grazed grass before a significant impact on production cost is realised.”⁶⁴ In other

words, grass-fed systems only achieve low cost when grass (fresh, silage and hay) is the dominant feed. The issue for milk producers is that milk yields per cow are lower under grass-based feed than concentrate. This is due to the seasonality of grass growth. It manifests itself as a tension within the Irish production system: how to achieve higher output while using the (relatively low-producing) grass-fed system.

As stated by Cele, Hennessy and Thorne in 2022, “The high seasonality of milk production in Ireland has limited efficiency in the processing industry, requiring a supply of milk throughout the year to maximise efficiency.”⁶⁵ They note that Ireland exploited the opportunity afforded by the ending of the milk quota in 2015, and that this expansion was achieved through productivity gains. “However,” they add, “despite the significant expansion, there were only marginal changes in land and labour size, suggesting that farms may be approaching their productive limit. If production continues to increase, the demand for more land will also increase in the long run.”⁶⁶ They propose government intervention to ensure

⁵⁹ Teagasc, *Quality Grass Silage for Dairy and Beef Production Systems: A Best Practice Guide* (Teagasc, 2025), 2.

⁶⁰ D. O'Brien, B. Moran, and L. Shalloo, “A National Methodology to Quantify the Diet of Grazing Dairy Cows,” *Journal of Dairy Science* 101, no. 9 (September 2018), 8599.

⁶¹ O. K. Shortall and A. Lorenzo-Arribas, “Dairy farmer practices and attitudes relating to grass-based, high-feed-input, and indoor production systems in Ireland,” *Journal of Dairy Science* 105, no. 1 (2022), 375.

⁶² Dáil Debates, Questions to the Minister for Agriculture, 2 November 2011, Question 382.

⁶³ <https://www.oireachtas.ie/en/debates/question/2011-11-02/382/>

⁶⁴ Teagasc, *Quality Grass Silage*, 2.

⁶⁵ M. O'Donovan, E. Lewis and P. O'Kiely, “Requirements of future grass-based ruminant production systems in Ireland,” *Irish Journal of Agricultural and Food Research* 50, no. 1 (2011), 3.

⁶⁶ L. P. Cele, T. Hennessy and F. Thorne, “Evaluating farm and export competitiveness of the Irish dairy industry: post-quota analysis”. *Competitiveness Review*, Vol. 32 No. 7 (2022), 6.

⁶⁷ Cele, Hennessy and Thorne, 15.

proper land-regulation policies, noting that if land access and fragmentation challenges remain unchanged, more dairy farmers will likely consider a combination of grazing and indoor high-input farming systems to expand their operations and remain competitive. Demand for feed will likely increase as well because less land may be available. Therefore, the increase in the number of cows may have severe environmental impact if not monitored accordingly.⁶⁷

“Ireland is one of the lowest cost milk producers worldwide;” equally, it “has one of the lowest milk yields in the EU, approx. 5,300 kg per cow.”⁶⁸ In contrast, milk production in the Netherlands, which relies heavily on purchased inputs, “achieves one of the highest milk yields in the EU, almost 8,000 kg per cow.”⁶⁹ Both countries share some similarities, particularly since the end of the quota: “Land is the most scarce production factor; hence, increasing dairy cow numbers on the existing land is an expansion strategy in both countries. That is, optimal land use is a key problem for dairy farmers and policymakers alike, and is limited by environmental regulations.”⁷⁰ Läßle and Sirr highlight that Ireland’s increase in milk output since 2008 “came from increasing cow numbers on an existing or increasing land base and intensifying dairy stocking rates.”⁷¹ Average herd size

grew from 63 to 71 dairy cows per farm between 2008 and 2013, an average increase of 12%, with the top quartile expanding herds by 37%. In contrast, forage area increased by only 4% during the same period. Because herd size increased more than land area, stocking density rose by an average of 6%. While Ireland has seen a general dairy intensification since 2008, yearly changes in dairy stocking rates have varied from minus 1% in 2009-10 to over 3% the following year.⁷²

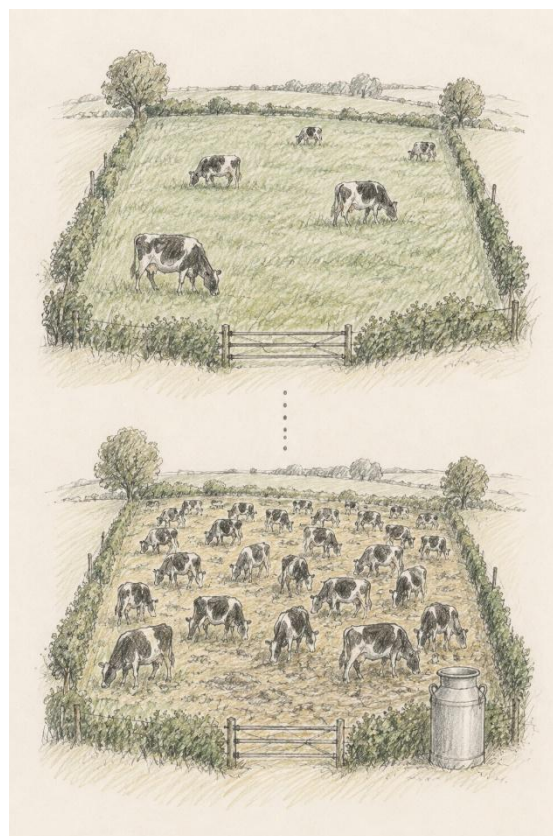


Figure 1 Dairy expansion after 2015 relied heavily on increasing cow numbers within a constrained land base.

⁶⁷ Cele, Hennessy and Thorne, 15.

⁶⁸ D. Läßle and G. Sirr, G, “Dairy Intensification and Quota Abolition: A Comparative Study of Production in Ireland and the Netherlands,” *EuroChoices* 18 (2019), 27.

⁶⁹ Läßle and G. Sirr, 27.

⁷⁰ Läßle and G. Sirr, 27.

⁷¹ Läßle and G. Sirr, 27.

⁷² Läßle and G. Sirr, 27.

The increase in stocking rates is contingent on higher grass yield per hectare. “Increasing stocking rates and more compact calving and lambing has resulted in increased spring feed demand. Extra grass needs to be grown and utilised in this period to minimise the use of supplementary feed.”⁷³ Yet, as the *Irish Farmers Journal* pointed out in 2020, “with higher stocking rates comes the necessity of growing in excess of 10t DM/ha of grass”, and that Ireland is “a long way off utilising 10t DM/ha on drystock farms and, without that, dairy beef systems will struggle financially.”⁷⁴

These structural parameters mean Irish milk processing plants run at a limited capacity of 62% year-round.⁷⁵ By way of contrast, processor plant capacity utilisation in Denmark and the Netherlands is 95.2%; Germany 94.1%; and France 92.4%.⁷⁶ In 2014, the last year before the milk quota was lifted, capacity utilisation was 61.4%.⁷⁷ This means that, since 2015, Irish milk processing plants, in terms of national output, have increased capacity utilisation by a mere 1.1% and are running around 35% below their European competitors. This is due to the

seasonality of the grass-fed system, where full capacity is used for only a few months of the year. Nonetheless, increasing milk output targets have been part of official state policy since at least July 2010 and the publication of *Food Harvest 2020*. “The strategy was aimed at growing the value of the agricultural sector's output by 33% by 2020 relative to the average position in the 2007–2009 period. The target for the dairy sector was to increase the volume of milk production by 50% by 2020 from the average of 2007 to 2009 base.”⁷⁸

The increase in dairy has had a knock-on effect on beef production. Teagasc noted that “The expansion of the dairy cow herd has given rise to a greater availability of dairy-origin calves for beef production.”” and that “the earlier average calving date for the Irish dairy herd and greater use of early-maturing sires increases the opportunity for finishing before the second winter for dairy calf-to-beef systems.”⁷⁹ In 2020, Teagasc said that ongoing dairy expansion will lead to “a further decline in suckler cow numbers up to 2027 as part of its outlook on what the beef sector will look like in 2027.”⁸⁰ This has

⁷³ M. O'Donovan, D. Hennessy and P. Creighton, “Ruminant grassland production systems in Ireland,” *Irish Journal of Agricultural and Food Research* 59, no. 2 (2021), 225.

⁷⁴ Adam Woods, “Suckler beef v dairy beef – where's the money?” *Irish Farmers Journal*, 22 December 2020.

⁷⁵ Laurence Shalloo, Declan O Connor, Lungelo Cele and Fiona Thorne. *An Analysis of the Irish Dairy Sector Post Quota* (Teagasc, 2020), 30.

⁷⁶ Shalloo et. al., 30.

⁷⁷ Shalloo et. al., 30.

⁷⁸ P. Kelly, L. Shalloo, M. Wallace and P. Dillon, “The Irish dairy industry – Recent history and strategy, current state and future challenges,” *Int J Dairy Technol*, 73 (2020), 309.

⁷⁹ Paul Crosson, Mark McGee and Pearse Kelly. “Selecting the Most Suitable System for your Beef Farm,” Teagasc, 2022 <https://teagasc.ie/animals/beef/grange/beef2022-open-day/beef-2022-main-stands/selecting-the-most-suitable-system/>

⁸⁰ Woods, “Suckler beef v dairy beef.”

been borne out by the facts. However, Teagasc added that “without the correct raw material, dairy-beef systems will be problematic for beef farmers” and that “environmental concerns including reducing net greenhouse gas emissions will be one of the key priorities for the beef industry over the coming years.”

LAND LEASES, SALES, AND AGRICULTURAL HOLDINGS

Formal land leasing agreements have increased markedly since 2015, as have land sale prices, both of which appear linked to increased demand for land from dairy. Indeed, various reports have noted demand for land under the grass-fed system since the 1990s. In 1999, the Joint Committee on Agriculture, Food and the Marine published a report on the future of Irish agriculture that highlighted the structural issues facing farmers looking to expand their operations. These reflected the legacies of the Land War, as well as the conacre system that grew out of it. However, with talk of lifting milk quotas and a more liberalised agricultural market within the EU, some structural change was needed.

The Property Services Regulatory Authority (PSRA) provides a weekly update of commercial leases, including farmland, going back to 2010, and is based on information provided by tenants under the Property Services (Regulation) Act 2011. It listed 3,624 separate agricultural land lease agreements in 2024. This was a 300%

increase in the ten years since 2014, when 1,273 lease agreements were entered into for agricultural land. The counties with the most agreements have also changed. Cork and Tipperary dominate both years; however, while Kerry, Waterford, and Kilkenny were in the top five in 2014 by the number of leases, Mayo, Galway, and Meath replaced them in 2024.

In terms of land sales, there are at least three reports that provide data, each one with its own criteria and data catchment process: the *Agricultural Land Prices* report issued by the CSO;⁸¹ the *Agricultural Land Report* produced annually by the *Irish Farmers Journal*;⁸² and the CSO’s *Agricultural Land Prices* report uses (non-public) administrative data from the Revenue Commissioners’ stamp duty returns to determine the median and mean price of sold land. It then draws on stamp duty return data, Tailte Éireann data, and the Census of Agriculture 2020 report to determine the type of land sold. The facts and figures released relate purely to agricultural land sold for agricultural use. The 2024 report found that 57,212 acres of agricultural land were sold nationally, down 8.9% from the 62,823 acres sold in 2023. The median price per acre was €9,988 in 2024, up 10.3% from €9,053 in 2023. Arable land commanded a considerably higher median price per acre of €17,898 in 2024, up 9.4% from €16,362 in 2023. Dublin and the South-East were the most expensive regions to

⁸¹ CSO, *Agricultural Land Prices 2024* (31 October 2025) <https://www.cso.ie/en/releasesandpublications/ep/p-alp/agriculturallandprices2024/>

⁸² *Agricultural Land Report 2025*, Irish Farmers Journal, 7 February 2026.

buy agricultural land, with median prices per acre of €24,125 and €14,991 respectively. Finally, the West region sold the highest volume of agricultural land, 12,782 acres.

Although both the volume of agricultural land sold for agricultural purposes and the number of individual transactions fell in 2024, the figures themselves have fluctuated around 61,000 acres and 3,500 transactions for the past four years (2021-2024). The apparent decline in sales since 2021 is tempered by the fact that the volume of land sold each year equates to less than 1% of the estimated five million acres of agricultural land in the state. By way of illustration, there was a 9% drop, year-on-year, in the volume of agricultural land sold in 2024. This amounts to around 0.1% of Ireland's total agricultural land use. We may be talking about tens of thousands of acres, but in terms of the national picture, the year-on-year change in legal ownership of agricultural land (that retains its agricultural use) is minuscule.

Only 6% of agricultural land sold in 2024 was arable land (3,289 acres); 94% of the volume related to permanent grassland (53,924 acres). There were also significant regional variations. The Mid-East and South-East accounted for 68% of the volume of arable land sold for agricultural purposes (2,241 acres); Border and West sold no arable land for agricultural purposes in 2024.⁸³ In terms of permanent grassland sold for agricultural purposes, West saw the

largest volume (12,782 acres); this was followed by Border (9,791 acres); Mid-West (9,141 acres); and South-West (7,900 acres). The West also saw the most transactions (838), for a simple average of 15 acres per transaction. However, the CSO does not sort sales by volume, so in theory the West could have seen one sale of 8,597 acres and 837 sales of five acres each; the result would be the same. The total value of arable land sold for agricultural purposes in 2024 was €67.5 million, with a median price of €17,898 per acre and a mean price of €20,517 per acre. The total value of permanent grassland sold for agricultural purposes was €488.3 million, with a median price of €9,623 per acre and a mean price of €9,057 per acre, indicating a negative skew toward lower-priced sales.

The *Agricultural Land Price Report* is produced annually by the Irish Farmers Journal (IFJ) and is sponsored by the Irish Farm Accounts Cooperative Society (IFAC). It is based “on the value and volumes of farms and land put on the market by private treaty, public auction and tender.” When compiling the report, it starts with information from sale advertisements in newspapers and online; it then contacts the selling agents for more information on each property they handle. From 2024 onwards, auctioneers have been able to input their own results directly into a database maintained by IFJ. The information includes: Size (in acres); Address; Method of Sale; Guide price and final

⁸³ CSO, ARA02: Agricultural Land Sales, 31 October 2025 <https://data.cso.ie/table/ARA02>

selling price; Occupation of the buyer—full-time beef, sheep, daily tillage and mixed farmers; and business farmers who may or may not also be farming

The report found 96,595 acres for sale across all regions, though it does not specify how many were sold. It lists farm sales, but it is unclear whether the acres offered relate solely to farm sales or include parcels sold separately from farm sales. For farms offered, of 2,300 advertised for sale, 679 (30%) were sold by year's end. Carlow had the highest percentage of sales completed (59%), while Kerry had the lowest (9%). In terms of transactions, the Agricultural Land Price Report 2024 draws on a much narrower sales database than the CSO, highlighting the limitations of data scraped from newspaper reports, auctioneers, and land agents. Overall, the Agricultural Land Price Report 2024 presents a picture of public auctions and sales that account for 21% of the transactions recorded by the CSO, while also capturing some sales (such as so-called “lifestyle” purchases) that the CSO does not record. It also provides interesting county-level data currently missing from the CSO report, which focuses on regional reporting.

In terms of those public auctions and sales, a picture emerges of dairy trying to square the grass-fed circle of low-productivity outputs and higher-

volume targets through land acquisition. “As a result of lower productivity, highly efficient farmers are having to buy in more feed or take on extra land in order to replace the feed that they are no longer growing on their existing acreage,” wrote the IFJ’s dairy editor, Aidan Brennan. “This is one reason for the increase in the demand for land. It's almost perverse in the sense that demand for an asset is increasing even though the return from that asset is actually reducing.”⁸⁴ In the words of Ciaran Moran, “Given its inflated value, it is virtually impossible now for a young farmer or someone from a non-farming family to purchase land.”⁸⁵

The CSO produces the Farm Structure Survey report, which currently covers 2003 to 2023. It compiles data on the structure of all agricultural holdings larger than one hectare. It uses a stand-alone CSO register, which holds all identified specialised farms in the state. The Department of Agriculture, Food and the Marine updates this register. Similar surveys are conducted in all EU member states, and Eurostat uses them to create comparable statistics across the EU. The 2023 Farm Structure Survey also the issuing of questionnaires to “34,988 farmers in the week preceding the reference date of 1st June 2023 and up to three reminders were issued in order to maximise the response rate.”⁸⁶

⁸⁴ Aidan Brennan, “How Will Dairy Farmers Impact the Land Market?” in Irish Farmers Journal, *Agricultural Land Price Report 2024* (Irish Farmers Journal, 2025), 24.

⁸⁵ Ciaran Moran, “The Future of Irish Land Questions?” in Terence Dooley, Tony McCarthy and Annie Tindley (eds.) *Land Reform and Legislation in Ireland, 1800–2024* (Four Courts Press, 2024), 333.

⁸⁶ CSO, Farm Structure Survey 2023: Background Notes and Definitions. 17 December 2024 <https://www.cso.ie/en/releasesandpublications/ep/p-fss/farmstructuresurvey2023/backgroundnotesdefinitions/>

The CSO estimated 133,174 active farms in June 2023. “This figure was estimated by combining data from the FSS survey and various administrative sources to create a full dataset of active farms in Ireland.”⁸⁷ An analysis of the number of agricultural holdings over one hectare from 2013 to 2023 shows a decline of around five%, from 139,600 to 133,174. The change in the distribution by holding size has not been uniform. The number of farms under 10 hectares rose sharply, by 9,010; the number of farms over 100 hectares also grew (+2,721), while the number of farms between eleven and 99 hectares shrank. Overall, the number of farms declined by 6,426. The Survey shows an increase in specialist tillage and beef farms over the period, but a dramatic decrease in mixed field crops (-1,758) and mixed grazing livestock (-1,079).

TILLAGE AND OTHER LIVESTOCK

The Land Use Review (Phase I) notes that around 6% of Ireland’s agricultural land is used to grow cereal crops, and that “the CSO Census of Agriculture data for cereals shows a decrease in the national area of cereal crops since 2010.”⁸⁸ An Bord Bia noted that from 1998 to 2023

the number of field vegetable growers in Ireland fell by 85%.⁸⁹ In his opening statement to the Joint Oireachtas Committee on Agriculture and Food on 1 October 2025, Kieran McEvoy, IFA Grain Chair, gave a stark overview of tillage in Ireland. “Ireland now has one of the lowest percentages of land devoted to arable cropping in the EU-27 at about 6.5% of Utilised Agricultural Area (UAA)”, he told the Committee. “This is despite 36% of Irish soils, or approximately 2.5m hectares, being classified as highly to moderately suitable for tillage production in the Irish soil.”⁹⁰ According to author and researcher Ciaran Moran, “the expansion of the dairy sector since 2012 generally came at the expense of the tillage sector as competition for the highest quality land ramped up.”⁹¹

The national policy framework for agriculture, *Food Vision 2030*, makes the point that “potential exists for Ireland to increase domestic production and reduce reliance on imported vegetables, protein crops and other grains. Craft brewers are also showing strong interest in sourcing malt produced from heritage malting barley varieties. Potential also exists in heritage grains.”⁹² However, the recent Land Use Review Phase II analyses tillage within a steady-state

⁸⁷ CSO, Farm Structure Survey 2023: Background Notes and Definitions

⁸⁸ O’Rourke, Byrne and Smith, *Land Use Evidence Review Synthesis Report*, 24.

⁸⁹ Tamara Fitzpatrick, “Just 60 Field Vegetable Growers Left in the Country—Bord Bia Director,” *Irish Independent*, 17 October 2023.

⁹⁰ Opening Statement by Kieran McEvoy, IFA Grain Chair to the Joint Oireachtas Committee on Agriculture and Food, 1st October 2025

https://data.oireachtas.ie/ie/oireachtas/committee/dail/34/joint_committee_on_agriculture_and_food/submissions/2025/2025-10-01_opening-statement-kieran-mcevoy-ifa-grain-chair-irish-farmers-association_en.pdf

⁹¹ Ciaran Moran, “The Future of Irish Land Questions?” in Terence Dooley, Tony McCarthy and Annie Tindley (eds.) *Land Reform and Legislation in Ireland, 1800–2024* (Four Courts Press, 2024), 331.

⁹² O’Rourke, Byrne and Smith, *Land Use Evidence Review Synthesis Report*, 92.

assumption, with no significant growth in any of its scenarios. It further notes that “2% of Ireland’s agricultural land is used for fruit, horticulture and other crops. This area has increased by 15% from 2010 to 2020.”⁹³ In its *Tillage Road Map 2030 report*, Teagasc wrote that “in recent years, the land area under tillage crop production has varied due to volatility in profitability, extreme weather events and increased competition for rented and leased land” and that “the majority of tillage output (excluding potatoes) supplies the animal feed with estimates suggesting that less than 15% is used for brewing, distilling and human consumption (e.g. oats).”⁹⁴

Tillage decline is influenced to a significant degree by the pressures faced by the dairy industry and its ongoing demand for land under the grass-fed system. Bobby Miller, chair of the Irish Grain Growers’ Group, noted in 2024 that, regarding the decline of tillage, “This all comes back to the issue of the nitrates derogation. Many dairy farmers held off leasing land to see if the agriculture minister could maintain the current agreements with Brussels. This hasn’t happened. As a result, dairy farmers are now out in force, renting the ground they need to keep their business compliant with the new measures.”⁹⁵ According to Miller, any weakening of the nitrates derogation would put pressure

on cattle numbers per hectare, requiring dairy farmers to acquire more land to maintain herd size. The *Irish Farmers Journal* pointed out in February 2026 that “it’s fair to say that the tillage area is expected to decline, as many farmers are unlikely to renew leases that are up for renewal. In the past few years, leases have been hard to keep, as demand from dairy farmers has been too strong, in their pursuit to hold onto their cow numbers.”⁹⁶ It appears, then, that the shift towards longer-term lease agreements, and the costs involved, benefited dairy over tillage.

In terms of pig and poultry farming, An Bord Bia notes that there are “under 400 commercial pig producers in the Republic of Ireland [and] about 800 producers in domestic poultry production, including egg producers, rearers and poultry meat growers.”⁹⁷ For family farms and regional income, the sheep sector is the most significant after dairy and beef. It “provides income for over 34,000 farm families who collectively farm over 3.7m sheep” and approximately half (17,000) of these farms can be described as specialised sheep farms where sheep is the dominant enterprise.”⁹⁸

ENVIRONMENT

The first time CAP took environmental concerns into consideration was in

⁹³ O’Rourke, Byrne and Smith, *Land Use Evidence Review Synthesis Report*, 25.

⁹⁴ Teagasc, *Tillage Road Map 2030* (Teagasc, 2026), 1.

⁹⁵ Richard Helleron, “Concern that Tillage Area set to Decline in 2024,” *Agriland*, 4 January 2024.

⁹⁶ Siobhán Walsh, “Tillage won’t be a major player in the land market,” *Irish Farmers journal*, 6 February 2026.

⁹⁷ Bord Bia, “Small number of pig and poultry farmers deliver big output,” *Irish Farmers Journal*, 7 May 2026.

⁹⁸ Teagasc, *Sheep Road Map 2030* (Teagasc, 31 March 2026), 1.

1980, in a regulation on structural aids for agriculture in the West of Ireland.⁹⁹ The regulation simply stated the need for “an assurance that the actions undertaken are compatible with the protection of the environment.”¹⁰⁰ The Commission had issued its first environmental action programme in 1973. By then, “the problem of nitrate pollution was already recognised. However, at the time, the Community had no real environmental policy or legal basis to act in this field.”¹⁰¹

Overall, eight Environment Action Programmes (EAPs) have been adopted, their duration ranging from 3 to 10 years. In 1997 the Department of the Environment published its policy paper, *Sustainable Development: A Strategy for Ireland*, which stated that the government would “develop suitable economic instruments to improve internalisation of external costs, including... exploration of market-based instruments such as emissions trading, offering flexibility to industry to achieve environmental improvements.”¹⁰² Yet, in terms of dairy, the “internalisation of external costs,” in particular the environmental costs associated with nitrates, has not occurred. Indeed, consistent lobbying for a derogation

from the nitrates directive shows the opposite.

In terms of the EU today, a certain weakening of environmental conditioning is underway. The CAP’s “current ‘conditionality’ system—which tied farmers’ payments to meeting environmental standards—has been swapped for a new ‘farm stewardship’ scheme,” and this has implications in terms of policy enforcement.¹⁰³ A key observation of the Land Use Review (Phase I) Report is that “new indicators might also be needed, depending on the measures or actions defined for land use in Ireland: a lack of soil data or soil indicators was identified as an evidence gap, with a recommendation that more work be done to assemble data on the status and health of Ireland’s soils.”¹⁰⁴

The recent *Report on the Proposed Carbon Budgets*, produced by the Joint Committee on Climate, Environment and Energy, noted that “Ireland requires an annual emissions reduction of at least 6.3% until 2040 to remain within the carbon budgets” and that “this represents an unprecedented and sustained level of emissions reductions.”¹⁰⁵ Despite this, there seems to be a desire on the part of the Climate Change Advisory Council (CCAC) to

⁹⁹ Tom Garvey, “EU Environmental Policy and Legislation Relating to Agriculture,” in Michael Maloney (ed.) *Agriculture and the Environment: The Proceedings of a Conference on the Integration of EC Environmental Objectives with Agricultural Policy, Held in the Royal Dublin Society from March 9–11, 1994* (Royal Dublin Society, 1994), 8.

¹⁰⁰ Council Regulation 1820/80, OJ No L 180, 14.7.80, p. 1

¹⁰¹ Garvey, “EU Environmental Policy,” 8.

¹⁰² Department of the Environment, *Sustainable Development: A Strategy for Ireland* (Stationary Office, 1997), 3.

¹⁰³ Natasha Foote, “EU Budget: From Green Deal to Raw Deal for the Environment.” *ARC2020*, 11 November 2025. <https://www.arc2020.eu/eu-budget-from-green-deal-to-raw-deal-for-the-environment/>

¹⁰⁴ Claire Byrne and Fiona O’Rourke, *Land Use Indicators* (EPA, 2023), 3.

¹⁰⁵ Joint Committee on Climate, Environment and Energy, *Report on the Proposed Carbon Budgets* (Houses of the Oireachtas, 2025), 7.

change definitions rather than policy: in effect, to change the goalposts, rather than change the game of play. The Council has decided to depart from the so-called “Paris Test” which had been used previously “by the CCAC during the first carbon budget cycle to evaluate Ireland’s appropriate contribution to global efforts to limit global warming to 1.5°C, in alignment with Article 2 of the Paris Agreement.”¹⁰⁶ Professor McMullin noted that this “directly conflicts with the professional ethical advice commissioned by the council itself,” which found that the choice of year “lay well outside the climate ethics consensus.”¹⁰⁷ In a strong critique of the revision, Professor John Sweeney told the Committee that “We cannot ignore the fact that we are grabbing a disproportionate share of the future and dwindling carbon budget to satisfy our political imperatives and economic needs. The tipping points have already arrived in many parts of the developing world, and we cannot ignore that.”¹⁰⁸

Ciaran Moran noted in 2024 that “Despite commitments by several governments since the 1980s that a new land authority would be created, Ireland has been essentially without any policy on land use for thirty years” since the dissolution of the Land Commission.¹⁰⁹ He further noted that “the expansion of the dairy sector since 2012 generally

came at the expense of the tillage sector as competition for the highest quality land ramped up.”¹¹⁰ The environmental journalist John Gibbons notes that “Ireland’s land-use system is... profoundly imbalanced” and that “the dominance of livestock, and the low level of food production for direct human consumption, explain why the agricultural industry is a disproportionate contributor to Ireland’s greenhouse emissions, biodiversity loss and water pollution.”¹¹¹ The system’s vulnerabilities to climate change (heatwaves, prolonged winter rainfall) will also make the grass-fed system even harder to maintain.

CONCLUSION

For all the focus put on Ireland’s “natural” advantage under its grass-fed dairy system, other dairy-producing states in the EU do not appear to be at a market-observable *disadvantage* because of their lessened use of seasonal outdoor grazing and heightened use of concentrate feed. In fact, Ireland requires a derogation from the level playing field of EU environmental law to compete in terms of exports—and is at present the only state in receipt of it. Its promotion of the Irish grass-fed system as “natural” is somewhat paradoxical, given that its continuance, at the present heightened

¹⁰⁶ *Report on the Proposed Carbon Budgets*, 13.

¹⁰⁷ *Report on the Proposed Carbon Budgets*, 13.

¹⁰⁸ *Report on the Proposed Carbon Budgets*, 14.

¹⁰⁹ Ciaran Moran, “The Future of Irish Land Questions?” in Terence Dooley, Tony McCarthy and Annie Tindley (eds.) *Land Reform and Legislation in Ireland, 1800–2024* (Four Courts Press, 2024), 331.

¹¹⁰ Moran, 333.

¹¹¹ John Gibbons, *The Lie of the Land: A Game Plan for Ireland in the Climate Crisis* (Sandy Cove, 2025), 158.

output post-quota, demands environmentally damaging levels of nitrates, with a resultant decline in water quality, and a significant increase in dairy cow population that detrimentally affects GHG emissions.

The Land Use Report argues that market and non-market “options, trade-offs and synergies” can “help resolve... different dimensions of land use;” nonetheless it stresses that “within an enhanced land use governance framework, decisions will ultimately lie with the land holder.”¹¹² By way of contrast, the analyst Richard Starkey makes a refreshingly simple, yet often overlooked, point: “The market has no inbuilt mechanism for ensuring that economies operate at a sustainable scale and that some form of intervention in the market is necessary to bring this about.”¹¹³ Ciaran Moran also makes the following point: “How can the open market meet all the demands for land in the coming decades without driving its value to stratospheric levels? Would this be in the farmers’ interest? Would it be in the public interest?”¹¹⁴

The issue is not one of more information with better facts to inform choices at individual farm level. Every market-based farmer must operate within certain coercive pressures of competition. Although these pressures are proffered as “natural” drivers of

efficiency, in reality the environmental costs are externalised. The most obvious example is the EU penalty system for non-compliance with GHG reduction targets. The Irish Fiscal Advisory Council and the Climate Change Advisory Council produced a report in 2025 which estimated that the Irish state may have to pay fines of between “€8 and €26 billion to its EU partners if it does not step up on climate action it has agreed to.”¹¹⁵ Yet it is the state as an entity, not industries or individuals, that will pay. In such a situation, talking about decisions ultimately lying with landholders is somewhat moot. If the fines are to be collectivised, then the decisions need to be made as well. An appeal to the ideology of market choice is not enough.

When state-mandated targets of output are separated from the mechanics of the Irish grass-fed system, the effect of the former on the latter is removed from the equation, and “grass-fed” becomes not a descriptor of a system of production in its totality, but instead little more than a marketing term. The fact that dairy is treated as the only game in town has very little to do with the physical land itself, and almost everything to do with the historical social and economic dynamics which have shaped, and continue to shape, what the land is used for, and by whom, and who should profit from it. Indeed, it is

¹¹² Land Use Review, *A Living Land: Report of Phase Two of the Land Use Review 2* (2026), 258.

¹¹³ Richard Starkey, “Competitiveness, Deregulation and Environmental Protection,” in *Deregulation in the European Union: Environmental Perspectives*, ed. Ute Collier (Routledge, 1998), 23.

¹¹⁴ Ciaran Moran, “The Future of Irish Land Questions?” 333.

¹¹⁵ Irish Fiscal Advisory Council, *A Colossal Missed Opportunity: Ireland’s Climate Action and the Potential Costs of Missing Targets* (2025), 3.

interesting to see the same chase after a “dual-purpose” breed today as a hundred years ago, except this time it is a desire for a dairy breed that can supply the beef industry, instead of the other way round. The calves for Irish beef production now arise from “the national herd of 2.4 million cows, of which currently 63% are dairy cows and 37% are suckler cows.”¹¹⁶ It is also sobering to compare the policy and investment strategies undertaken by Danish agriculture and its dairy cooperatives from the 1880s to the 1940s—strategies that were continuously and fruitlessly referenced by pioneers and visionaries within the IAOS—with those that were used to actually shape Irish agriculture, at first under a British administration, but which were continued almost without change by successive Irish governments post-1922. The persistent revolt against structural investment bordered on pathological, and in that revolt the much-vaunted, low-cost, grass-fed system has its roots. Ireland may be at the stage now, though, where the contradictions within that system are too great to continue, and *genuine* alternatives for land are not only needed but demanded by the realities on the ground.

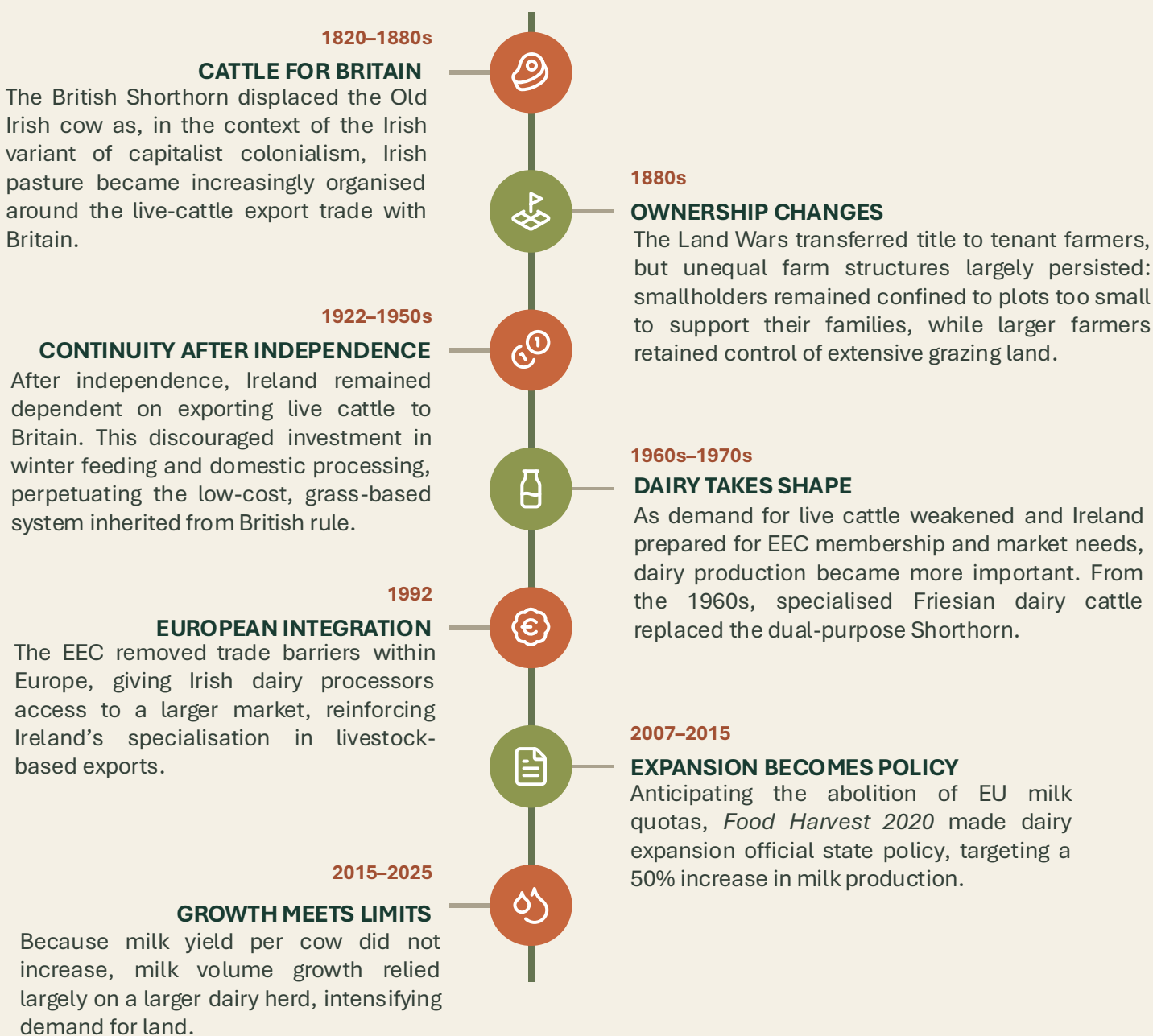
¹¹⁶ Teagasc, “Performance Targets.”

SUMMARY:

The making of Ireland's grass-fed system

Land, livestock and policy from colonial trade to dairy expansion

Ireland's livestock economy reflects two centuries of ownership struggles, export dependence and state choices. Climate shaped the possibilities, but policy shaped the system.



Core message: A low-cost export system now competes for land while shifting environmental costs onto the public

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